

Registration/Intake Form

Seminar Date (if applicable):

PART A: General Information

Personal Details

Name				
	Last Name (Please print)		First Name	
Spouse Name (if applicable)				
	Last Name (Please print)		First Name	
Address				
	Apt.	No.	Street	
	City		Province	Postal Code
Phone Number				
	Home	Work	Mobile	
Email				
May we contact you via email?		<input type="checkbox"/> Yes		

1. I am a:

- Person with a disability
- Relative of a person with a disability (please indicate):
- Support worker
- Financial advisor
- Other:

2. What is your occupation?

3. How did you hear about us?

- Friend/Family Referral
- Organization Referral
- Website
- Newsletter
- Radio
- Other:

4. I am interested in information on the following:

- Henson Trust/Wills
- ODSP Benefits
- Tax Credits
- Estate & Financial Planning
- RDSP
- Guardianship
- Other:

5. Do you currently have a Will?

Yes No

6. If yes, does it contain a Henson Trust agreement? Yes No Unsure

7. Do you currently have a RDSP?

Yes No

Additional Information Regarding Person with a Disability

1. Name of person with a disability:

2. Age of person with a disability (provide date of birth if available):

3. Nature of disability:

4. If the person with a disability is 18 years of age or older, is (s)he receiving Ontario Disability Support Program (ODSP) benefits?

Yes (indicate: \$1042/mo. \$797/mo. other \$) No Unsure

5. If your child receives the ODSP rooming amount (\$797/mo.), can your child help with shopping and cooking, even if supervision is required? Yes No

6. Is the person with a disability currently approved for the Disability Tax Credit?

Yes (if yes, in what year was (s)he approved?) No Unsure

7. Is the person with a disability or a relative claiming the Disability Tax Credit?

Yes (if yes, in what year did the claim start?) No Unsure

8. Are you or another relative currently claiming the Caregiver Tax Credit?

Yes (if yes, in what year did the claim start?) No Unsure

9. How would you describe the living arrangement of the person with a disability?

The person with a disability lives with me (or another relative) full-time

The person with a disability lives with me (or another relative) part-time, e.g. when ill, on weekends, during holidays, etc. (describe):

The person with a disability lives in a supported living environment full-time

The person with a disability lives independently full-time

Other (describe):

10. If the person with a disability does not live with a relative, do you or another relative provide to him/her any basic necessities such as food, clothing, or shelter? Yes No

Kenneth C. Pope LL.B TEP

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From: Kenneth C. Pope LLB TEP

To:

Date:

Re: Disability and Estate Planning Seminar Topics and Practice Areas

These are the main topics discussed at my seminars, along with other matters of interest to the audience that they may raise, and are my core areas of practice.

ODSP eligibility and benefits, increasing amounts from room and board to shelter plus supplementary benefits. Exempt asset arrangements.

Using and back filing the disability and caregiver tax credits, the disability child amount and the Canada Disability Child Benefit.

RDSPs, contributions and accumulations, payments from RDSPs.

Guardianship. Powers of Attorney from children and related issues.

Wills and Henson trust arrangements, and use of additional trusts for estate and tax planning purposes. Trustee 'conflict of interest' issues.

Funding trusts with life insurance.

'Adult dependent survivor' pensions for adult children with disabilities, from OMERS, Teachers, OPG, and other pension plans.

RRSP rollovers to or for adult children with disabilities and ODSP related issues.

Life time benefits trusts to receive RRSPs for children as parallel trusts.

Planned giving, bequests, charitable remainder gifts and minimization of income on death from RRSPs.

Access my archived web seminars on my web site for further information. www.kpopelaw.ca